

**GOVERNMENT OF
THE VIRGIN ISLANDS OF THE UNITED STATES**

**Request for Proposal – Negotiation
Professional Services**

To:

Date: April 5, 2017

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RFP No. 010-2017 (P)

Pursuant to 31 V.I.C. 239 (a) (4) and Rules and Regulations thereunder issued, the Government of the Virgin Islands, Department of Property and Procurement will receive proposals for the work described below. Proposals will be received no later than **Friday, May 5, 2017 @ 4:00 o'clock p.m.** Atlantic Standard Time.

SCOPE OF SERVICES: ATTACHED

NEGOTIATED PROCEDURES:

The Commissioner of the Department of Property and Procurement will appoint a Selection Committee to assist in the evaluation and selection of the Contractor. Accordingly current data on qualifications and performance should be submitted with proposals. After reviewing the qualifications and proposals the Committee will select for discussions from the firm/s or person/s considered not less than three (3), in order of preference, **deemed to be most highly qualified to provide the services herein required.** Discussions will be conducted successively and severally with the firm/s or individual/s so selected the anticipated concepts and the relative utility alternative methods of approach for furnishing the services hereunder.

FACTORS FOR DISCUSSIONS

Selection criteria will include (i) Professional qualification, registration and general reputation of principals of the firm or individual; (ii) the extent to which the firm or individual specializes in or has performed services of similar scope to the hereunder; (iii) familiarity with the location(s) in which services will be performed; (iv) quality of performance on other similar projects.

NEGOTIATION:

The Selection Committee shall recommend to the Commissioner **the highest qualified firm or person with whom a contract shall be negotiated.** The Commissioner, with the assistance of the Selection Committee, shall attempt to negotiate a contract with such firm or person.

Should the Commissioner be unable to negotiate a satisfactory contract with the firm considered to be the most qualified, at a price he determines to be fair and reasonable to the Government, negotiations with that firm will be formally terminated. Negotiations will then commence with the second most qualified, the third most qualified or additional firms, in order of preference, their competence and qualification, and shall continue until an agreement is reached.

Lloyd T. Bough, Jr.
Commissioner Nominee
Department of Property and Procurement

INSTRUCTION TO PROPOSALS

A. NOTICE

RFP-010-2017 (P) To assist and advise the Virgin Islands Health Insurance Board of Trustees in administering the Government's Health Insurance Program in the U.S. Virgin Islands

Information provided in the scope of work is to be used only for purposes of preparing a proposal. It is further expected that each bidder will read the scope of work thoroughly, for failure to meet certain specified conditions may invalidate the proposal.

The Government of the Virgin Islands, herein after referred to as GVI, reserves the right to reject any or all proposals or any portion thereof and to accept the proposal deemed most advantageous to GVI. Price shall not be the sole criterion of awarding this project. Scope and quality of work proposed and the ability of the bidder to complete this type of project shall also be considered.

Applicants are requested to submit proposals on the basis of the scope of work. Alternative proposals recommending new features and technology other than that requested in the scope of work will receive consideration providing such new features and/or technology is clearly explained. Any exceptions to the requirements requested herein must be clearly noted in writing and be included as part of the proposal.

The information contained herein is believed to be accurate, but is not to be considered in any way as a warranty. Request for additional information clarifying the Scope of Services should be directed in writing to **Dazarene Lescott** at dazarene.lescott@dpp.vi.gov. Requests will be forwarded to Ms. Maureen Venzen, Chief, Group Health Insurance, GESC/Health Insurance Board of Trustees.

B. STATEMENT OF PURPOSE

RFP-010-2017 (P) To assist and advise the Virgin Islands Health Insurance Board of Trustees in administering the Government's Health Insurance Program in the U.S. Virgin Islands

C. PROPOSED SCOPE OF SERVICES

See Attached

D. TIMETABLE

1. Last day for requests for written clarification will be **Tuesday, April 18, 2017 @ 4:00 p.m.** Atlantic Standard Time.
2. Proposals will be accepted at the Department of Property & Procurement, no later than **Friday, May 5, 2017 @ 4:00 p. m.** Atlantic Standard Time.

E. SUBMISSION OF PROPOSAL

All interested parties shall submit *one* (1) original and *five* (5) copy sets of proposals, which are to be delivered to the Department of Property and Procurement no later than **Friday, May 5, 2017 @ 4:00 p. m.** Atlantic Standard Time.

They shall be addressed to:

Lloyd T. Bough, Jr.
Commissioner Nominee
Property & Procurement
8201 Subbase, 3rd Floor
St. Thomas, Virgin Islands 00802

THE SEALED ENVELOPE CONTAINING THE PROPOSAL MUST HAVE THE FOLLOWING INFORMATION WRITTEN ON THE OUTSIDE OF THE ENVELOPE OR PACKAGE:

SEALED PROPOSALS-DO NOT OPEN

RFP-010-2017 (P)

(Name of Bidder)

(Mailing Address of Bidder)

(Telephone Number of Bidder)

(Fax Number of Bidder)

Where proposals are sent by mail, the bidder shall be responsible for their delivery to Department of Property & Procurement before the date and time set for the closing of acceptance of proposals.

F. WITHDRAWALS OF PROPOSAL

A proposal may be withdrawn at any time prior to the time specified as the closing time for acceptance of proposals. However, no proposal shall be withdrawn or canceled for a period of thirty (30) days after said closing time for acceptance of proposals nor shall the successful provider withdraw, cancel or modify the proposal, except at the request of GVI after having been notified that said proposal has been accepted by GVI.

G. INTERPRETATION OF SPECIFICATIONS

If any person contemplating submitting a proposal requires clarification of any part of the scope of work, he/she may submit to the GVI a written request for an interpretation thereof to the **Commissioner Nominee of Department of Property and Procurement Lloyd T. Bough, Jr.** GVI will not respond to questions received after the above established date. The person submitting the request will be responsible for its prompt delivery. Any interpretation of the scope of work will be made in writing to all prospective providers. Oral explanations will not be binding.

H. CONSIDERATION OF PROPOSAL

The Commissioner of Property and Procurement shall represent and act for GVI in all matters pertaining to the scope of work and contract in conjunction therewith. **This RFP does not commit GVI to the award of a contract, nor pay of any cost incurred in the preparation and submission of proposals in anticipation of a contract. GVI reserves the right to reject any or all proposals and to disregard any informality and/or irregularity in the proposal when, in its opinion, the best interest of GVI will be served by such action.** Proposals failing to provide some of the items in the scope of work shall not be rejected per se but any deviations from the scope must be clearly noted.

I. ACCEPTANCE OF PROPOSALS

GVI will notify in writing acceptance of one of the proposals. Failure to provide any supplementary documentation to comply with the respondent's proposal may be grounds for disqualification.

J. CONTENTS OF PROPOSAL

The following is a list of information to be included in the written proposal. Failure to comply with all the requirements as outlined, may disqualify the applicant.

1. Introductory letter about the applicant:
 - a. Name, address, email and telephone numbers.
 - b. Type of service for which individual/firm is qualified.
2. Organization:
 - a. Names/addresses of Principals of Firm.
 - b. Names of key personnel with experience of each and length of time in organization.
 - c. Number of staff available for project. (Local & Off-Territory)
 - d. Copy of Articles of Incorporation
 - e. Copy of Certificate of Resolution
 - f. Copy of valid Business License
3. Outside consultants that will be retained for this project and percentage of work to be sub-contracted.
4. Project experience:
 - a. List of completed projects and estimated cost of each.
 - b. Current projects underway; scope; percentage completed to date and estimated cost of each.
5. Project References: (including a notarized written consent from the authorized representative which must include: name; telephone number; email address and facsimile number).
6. Project Approach:
 - a. Describe how you will approach this project and availability to perform the services requested.
7. Cost: The Cost Proposal must be submitted in a **separate** sealed envelope.

K. CONFLICT OF INTEREST

A proposer filing a proposal hereby certifies that no officer, agent or employee of GVI has a pecuniary interest in this proposal or has participated in contract negotiations on behalf of GVI; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other Bidder for the same request for proposals; the Bidder is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.

L. LICENSE REQUIREMENT

An award will not be made to any firm or individual doing business in the Virgin Islands to perform work with the Government of the Virgin Islands until evidence is submitted that the said firm or individual has a valid V.I. Business License to do business in the Virgin Islands. Bidders must submit hard copy of a valid V.I. Business License within ten (10) business days after award. All Bidders bidding as Joint Ventures must be licensed as a Joint Venture in the Virgin Islands.

M. REQUIRED DOCUMENTS

1. **PUBLIC LIABILITY:** The successful bidder will be required to obtain and have in place public liability insurance and other insurance necessary as requested in this proposal package. Insurance policy(ies) shall name the Government of the Virgin Islands as "**Additional Insured**". The public liability insurance shall have a minimum limit of not less than **one hundred thousand (\$100,000.00) dollars** for any one occurrence for death or personal injury and **one hundred thousand (\$100,000.00) dollars** for any one occurrence for property damage. Bidder must provide public liability insurance within ten (10) business days after award.
2. **WORKERS' COMPENSATION:** Within ten (10) business days after award of contract, the successful bidder must submit a copy of their certificate verifying his firm and agents are covered by Workers' Compensation Insurance.
3. **FAILURE TO PROVIDE CERTIFICATES WITHIN THE STATED TIME PERIOD MAY RESULT IN THE PROPOSAL DEEMED NON-RESPONSIVE AND MAYBE IMMEDIATELY DISQUALIFIED WITH NO FURTHER CONSIDERATION GIVEN FOR POTENTIAL AWARDING OF THE CONTRACT.**

N. REQUIREMENTS FOR CORPORATION

1. ARTICLES OF INCORPORATION
2. CERTIFICATE OF CORPORATE RESOLUTION
3. CERTIFICATE OF GOOD STANDING

THESE ARE REQUIRED PRIOR TO AWARD OF CONTRACT.

Scope of Services Performed by Consultant

The Board requires a consultant to advise on all aspects of its insurance program – including medical, drugs, dental, death, disability and vision care options. The consultant also assists and leads the board in reviewing and assessing all types of funding mechanisms, reserve requirements, and plan design alternatives that could result in cost savings at comparable levels of benefits. Though the emphasis is on providing assistance during the annual renewal negotiation process, the consultant assists the Board in taking a proactive approach to managing the program on a long term basis.

- Research and consultation covering all aspects of the Program, including experience, funding arrangements, claims, reserves, benefit design, benefit option(s), and the overall progress and development of the Program in light of current industry trends and in comparison to plans of similar size type in other jurisdictions.
- Obtain pertinent information from the Government's insurance carriers in order to evaluate the current insurance plan and make recommendations as to improvements that will benefit the Government.
- Consult with related parties, including government officials of the Government of the Virgin Islands with respect to the existing cash management infrastructure and established laws, rules, regulations, policies and procedures related to appropriating and allotting funds for government purposes, and more specifically for health insurance and related purposes, insofar as it relates to proposed changes in funding mechanisms in order to determine the best suited funding mechanism(s) for the Government of the Virgin Islands health insurance programs.
- Advise on any changes in the responsibility to the Government of the Virgin Islands, Group Health Insurance Office and/or the Board, as it relates to compliance with the Health Insurance Portability and Accountability Act or any local or federal law or rules and regulations governing the protection of personal health information.
- Communicate research findings and consulting with the Board and the insurance companies and, when necessary, consult with related parties, including government officials and legal counsel regarding plan changes to be made and implemented.

Renewals. Full consulting services (including meetings) with respect to the annual premium rate renewals for all of the benefit plans including Medical/Rx, Dental, Life Insurance and Vision Care

Year End Accountings. Full consulting services (including meetings) with respect to the annual financial settlements and performance guarantee reconciliations presented by the insurers for all participating benefit plans

Plan Design. Provide ongoing strategic plan design analysis and recommendations, including during the renewal process, to ensure that the Program continues to meet the Government's needs in such respects as cost, competitiveness and feasibility. New benefits will be considered and analyzed whenever appropriate to address changing vendor and provider delivery patterns.

Plan Funding. Provide ongoing strategic plan funding analysis and recommendations, including during the renewal process, to ensure that the Program continues to meet the Government's needs in such respects as cost, competitiveness and feasibility. New funding arrangements will be considered and analyzed whenever appropriate.

Plan Administration

Assist the Government with the ongoing administration of the Health and Welfare benefits program by providing advice, analysis and assistance with such facets as enrollment, eligibility, financial reporting, plan document interpretation, training, Legislative hearings, consulting invoices,

Plan Communications. Assist the Government with the ongoing communication of the health and welfare benefits program to participants, providers and administrators by providing advice, analysis and assistance with such facets as Summary Plan Descriptions (SPDs), contracts and announcement letters.

Regulatory Compliance. Monitor changes in regulatory activity and keep the Government apprised of any actions that will impact the benefit plans.

Vendor Negotiations and Management. Lead negotiations with the insurance companies to obtain appropriate adjustments, by assessing whether the carrier's annual administrative fees or retention is consistent with its projection, or if the proposed premium rates, for any plan alternative outlined in the response to the RFP that may be favorably considered by the Board, appear justified based on claims experience.

Ad Hoc Consulting Assistance. Be available on a daily basis to assist all parties at the Government with consulting services in a broad range of areas.

Plan Analysis. Consultant will conduct and provide results of the following plan analyses:

Claim audits

Detailed and Comprehensive claims analyses

Compliance audits

Extensive Benchmark studies of specific competitors

Eligibility audits

Pharmacy benefits/vendor analysis

Non-discrimination testing

Employee surveys

GASB valuation*

**support work only as the actual valuations are done under a separate contract with the
Department of Finance*

Comprehensive marketing of plans

Project Approach

SOW TASK #	Activities to be Performed	Timing	Dependencies on other tasks or events	Result or deliverable	Assumptions or constraints
1	Research and consultation covering all aspects of the Program, including experience, funding arrangements, claims, reserves, benefit design, benefit option(s), and the overall progress and development of the Program in light of current industry trends and in comparison to plans of similar size type in other jurisdictions.	Ongoing throughout the year.	Initiated either by Board request, Consultant recommendation, vendor activity, regulatory change or other prompt. Certain activities (e.g., benefit design review) done at least annually as part of the renewal process (April-September).	Depending on the nature of the activity, results can be communicated through reports, presentations, letters, emails, conference calls, etc.	None – although Consultant is not authorized to provide legal advice
2	Obtain pertinent information from the Government's insurance carriers in order to evaluate the current insurance plan and make recommendations as to improvements that will benefit the Government.	Ongoing throughout the year (with increased activity during the annual renewal process in April-September).	In some cases, will be initiated by specific requests from the Board or other government entity. Otherwise, will be an ongoing process initiated by Consultant.	Depending on the nature of the activity, results can be communicated through reports, presentations, letters, emails, conference calls, etc.	In some cases, analyses will be dependent upon the availability of specific information from the insurance carriers.
3	Consult with related parties, including government officials of the Government of the Virgin Islands with respect to the existing	Ongoing throughout the year (with	At the Board's direction, Consultant will interact with any related parties to	Depending on the nature of the activity, results can be communicated	Consultant will require continued access to reliable

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	cash management infrastructure and established laws, rules, regulations, policies and procedures related to appropriating and allotting funds for government purposes, and more specifically for health insurance and related purposes, insofar as it relates to proposed changes in funding mechanisms in order to determine the best suited funding mechanism(s) for the Government of the Virgin Islands health insurance programs.	increased activity during the annual renewal process in April-September).	evaluate funding issues that best meet the GVI's needs and circumstances.	through reports, presentations, participation in hearings or Board meetings, letters, emails, conference calls, etc.	information about the GVI's cash management infrastructure.
4	Advise on any changes in the responsibility to the Government of the Virgin Islands, Group Health Insurance Office and/or the Board, as it relates to compliance with the Affordable Care Act or any local or federal law or rules and regulations governing the protection of personal health information (PHI).	Ongoing throughout the year	Initiated by Board request, Consultant recommendation, regulatory change, funding change or other prompt.	Depending on the nature of the activity, results can be communicated through reports, presentations, letters, emails, conference calls, etc.	None – although Consultant is not authorized to provide legal advice.
5	Communicate research findings and consulting with the Board and the insurance companies and, when necessary, consult with related parties, including government officials and legal counsel regarding plan changes to be made and implemented.	Ongoing throughout the year, with increased activity during the annual renewal process (April-September)	Initiated either by Board request, Consultant recommendation, vendor activity, regulatory change or other prompt.	Depending on the nature of the activity, results can be communicated through reports, presentations, letters, emails, conference calls, etc.	None – although Consultant is not authorized to provide legal advice

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6	<u>Renewals.</u> Full consulting services (including meetings) with respect to the annual premium rate renewals for all of the benefit plans including Medical/Rx, Dental, Life Insurance and Vision Care	April 1 – September 30 (with some preparatory and follow-up work outside of these dates)	Carrier renewals are to be delivered in early May based on experience thru 4/30.	Results determined and communicated through reports, presentations, participation in hearings and meetings, letters, emails, conference calls, etc.	Timeframe assumes no changes to the current renewal date or mandated deadlines.
7	<u>Year End Accountings.</u> Full consulting services (including meetings) with respect to the annual financial settlements and performance guarantee reconciliations presented by the insurers for all participating benefit plans	Oct 1 – April 15 (depending on specific delivery dates of carrier performance guarantee reports)	Carrier year-end accountings are to be delivered in early March based on experience thru preceding 9/30.	Results determined and communicated through reports, presentations, participation in hearings and/or meetings, letters, emails, conference calls, etc.	Timeframe assumes no changes to the current renewal date or carrier delivery dates.
8	<u>Plan Design.</u> Provide ongoing strategic plan design analysis and recommendations, including during the renewal process, to ensure that the Program continues to meet the Government's needs in such respects as cost, competitiveness and feasibility. New benefits will be considered and analyzed whenever appropriate to address changing vendor and provider delivery patterns.	Ongoing throughout the year (with increased activity during the annual renewal process in April-September).	In some cases, will be initiated by specific requests from the Board or other government entity. Otherwise, will be an ongoing process initiated by Consultant.	Depending on the nature of the activity, results can be communicated through reports, presentations, participation in meetings, letters, emails, conference calls, etc.	None

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9	<u>Plan Funding.</u> Provide ongoing strategic plan funding analysis and recommendations, including during the renewal process, to ensure that the Program continues to meet the Government's needs in such respects as cost, competitiveness and feasibility. New funding arrangements will be considered and analyzed whenever appropriate.	Ongoing throughout the year (with increased activity during the annual renewal process in April-September).	In some cases, will be initiated by specific requests from the Board or other government entity. Otherwise, will be an ongoing process initiated by Consultant.	Depending on the nature of the activity, results can be communicated through reports, presentations, participation in meetings, letters, emails, conference calls, etc.	None
10	<u>Plan Administration.</u> Assist the Government with the ongoing administration of the Health and Welfare benefits program by providing advice, analysis and assistance with such facets as enrollment, eligibility, financial reporting, plan document interpretation, training, Legislative hearings, consulting invoices.	Ongoing throughout the year (with some increased activity during the annual renewal process in April-September).	In some cases, will be initiated by specific requests from the Board or other government entity – or a carrier. Otherwise, will be an ongoing process initiated by Consultant.	Depending on the nature of the activity, results can be communicated through reports, presentations, participation in meetings, letters, emails, conference calls, etc.	None – although Consultant is not authorized to provide legal advice
11	<u>Plan Communications.</u> Assist the Government with the ongoing communication of the health and welfare benefits program to participants, providers and administrators by providing advice, analysis and assistance with such facets as Summary Plan Descriptions (SPDs), contracts and announcement letters.	Ongoing throughout the year (with most increased activity during the annual renewal process in July - October).	Dependent on finalization of plan designs, etc.	Draft communications materials or contracts with changes highlighted, emails, letters, meetings, etc.	None – although Consultant is not authorized to provide legal advice

SOW TASK #	Activities to be Performed	Timing	Dependencies on other tasks or events	Result or deliverable	Assumptions or constraints
12	<u>Regulatory Compliance.</u> Monitor changes in regulatory activity and keep the Government apprised of any actions that will impact the benefit plans.	Ongoing throughout the year.	Will be driven primarily by changes in Federal or Territorial law – or accounting standards. These will be monitored by Consultant.	Depending on the nature of the activity, results can be communicated through reports, presentations, participation in meetings, letters, emails, conference calls, etc.	In some instances, Consultant will be dependent on the Board to provide advance notice of pending changes in USVI regulations
13	<u>Vendor Negotiations and Management.</u> Lead negotiations with the insurance companies to obtain appropriate adjustments, by assessing whether the carrier's annual administrative fees or retention is consistent with its projection, or if the proposed premium rates, for any plan alternative outlined in the response to the RFP that may be favorably considered by the Board, appear justified based on claims experience.	Ongoing throughout the year (with increased activity during the annual renewal process in April-September).	Annual administration changes will be automatically reviewed. Premium rates for alternative plan designs will be reviewed and also independently calculated by Consultant. In some cases, activity will be initiated by specific requests from the Board or other government entity. Otherwise, will be an ongoing process initiated by Consultant.	Depending on the nature of the activity, results can be communicated through reports, presentations, participation in meetings, letters, emails, conference calls, etc.	None

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14	<u>Ad Hoc Consulting Assistance.</u> Be available on a daily basis to assist all parties at the Government with consulting services in a broad range of areas.	Ongoing throughout the year.	In some cases, will be initiated by specific requests from the Board or other government entity – or by action by a carrier. Otherwise, will be an ongoing process initiated by Consultant.	Depending on the nature of the activity, results can be communicated through reports, presentations, participation in meetings, letters, emails, conference calls, etc.	Consultant will consult with any related party at the Government, subject to prior approval by the Board. Significant out of scope work for non-Board entities could be subject to additional consulting fees.
15	<u>Plan Analysis.</u> Consultant will conduct and provide results of the following plan analyses:				
15a	Claim audits Provide audit services for medical and pharmacy benefit plans. GUSVI may elect to engage either a traditional or alternative audit methodology. The traditional methodology may be utilized to infer overall administrator performance. The alternative methodology relies on 100% data review followed by interactive qualification or a site audit. Allows audit team to focus on specific areas of the greatest financial risk for the GUSVI.	Medical claim payment audit is recommended once every 3-5 years	Project requirements: GUSVI authorization to audit; BAA and confidentiality agreements; Administrator provided claim and eligibility data	Consultant to complete data mining tasks and applicable site audit(s). All findings and outcomes to be provided in Executive Summary and presented to GUSVI. Reports to be provided to GUSVI in advance of final presentation.	If audits are requested more frequently than normal cycle, additional consulting fees could apply.

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15b	Detailed and Comprehensive claims analyses	Claims experience analyzed annually during renewal period (April to September). Comprehensive claims analysis would be done on an ad hoc basis.	In some cases, will be initiated by specific requests from the Board or other government entity – or by action by a carrier. Otherwise, will be an ongoing process initiated by Consultant.	Depending on the nature of the activity, results can be communicated through reports, presentations, participation in meetings, letters, emails, conference calls, etc.	Frequent or exhaustive claims analytics could be subject to additional consulting fees.
15c	Compliance audits	Ad hoc	Initiated at Board request	Results will be communicated through formal report/presentation	May be an additional cost item depending on the frequency and scope of the proposed audits.
15d	Extensive Benchmark studies of specific competitors	Ongoing throughout the year.	In some cases, will be initiated by specific requests from the Board or other government entity – or by action by a carrier. Otherwise, will be an ongoing process initiated by Consultant.	Depending on the nature of the activity, results can be communicated through reports, presentations, participation in meetings, letters, emails, conference calls, etc.	Will sometimes depend on the availability of specific information about competitor plans.

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15e	Eligibility audits Verification of the eligible status of enrolled dependents on the GUSVI Plan. A Dependent Eligibility Verification (DEV) project can range from a sampling of the dependent population to verification of 100% of enrolled dependents.		Generally dependent eligibility projects should not overlap with an annual enrollment period	Consultant to provide dependent eligibility guideline evaluation; member communications and fulfillment; DEV Customer Service Center; Executive Summary presentation of results	Comprehensive audit would be an additional cost item not included in the annual retainer
15f	Pharmacy benefits/vendor analysis	Full evaluation of plan design, benchmarking and clinical programs annually. Full evaluation of contract and pricing terms every 2-3 years.	Initiated at direction of the Board and subject to agreement with Consultant on project approach	Results determined and communicated through reports, presentations, participation in hearings and/or meetings, letters, emails, site visits, conference calls, etc.	Current fully insured arrangement may limit the availability of data for analysis
15g	Non-discrimination testing	Ad hoc	Implementation of Section 125 or Section 129 Spending account plans	Results will be communicated via letter	Testing is not currently applicable

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15h	Employee surveys	Upon request	Initiated at direction of the Board (possibly based on recommendations from Consultant) and subject to agreement with Consultant on project approach and (if applicable) additional fees	Results determined and communicated through reports, presentations, participation in hearings and/or meetings, letters, emails, site visits, conference calls, etc.	Frequent surveying or requests for exhaustive analysis of survey data could be subject to additional consulting fees.
15i	GASB valuation	Full valuation at least every 2 years. Annual roll-forwards.	Currently being performed for the Department of Finance under a separate contract. Would require this responsibility to be transferred from DOF to the Board and then initiated at direction of the Board and subject to agreement with Consultant on project approach and fees	Results determined and communicated through reports, presentations, participation in hearings and/or meetings, letters, emails, conference calls, etc.	Consultant will provide the Board with consulting services and advice related to the impact of GASB rules on plan design and funding. Full GASB valuations and annual roll forwards would be additional cost items not included in the annual retainer.
15j	Comprehensive marketing of plans	At least every 5 years	Initiated at direction of the Board and subject to agreement with Buck on	Results determined and communicated through reports, presentations,	

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			project approach and fees	participation in hearings and/or meetings, letters, emails, site visits, conference calls, etc.	